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# Family Vault: How to Protect and Organize Your Personal Information for Your Family

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FAMILY VAULT: HOW TO PROTECT AND ORGANIZE YOUR PERSONAL  
INFORMATION FOR YOUR FAMILY

by  
Mary Daniel Simpson

A thesis submitted to the faculty of The University of Mississippi in partial  
fulfillment of the requirements of the Sally McDonnell Barksdale Honors College.

Oxford  
April 2015

Approved by

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## ABSTRACT

Integrated Marketing Communications courses focus on examining marketing campaigns and learning to create pieces of campaigns. Students are taught that new product campaigns must garner brand awareness, and in order to do so effectively, must be weighted heavily in insightful research. This thesis seeks to culminate the knowledge gathered from the curricula by designing both a new product and an integrated campaign from which to launch the product.

The new product is a life document organizer, to be used in preparation for a tragedy, such as death or natural disaster. The product's purpose is to easily deliver peace of mind to those with friends and family dependent upon them. The name of the brand and its product is Family Vault.

This thesis compiles primary research in the form of an anonymous Qualtrics survey and personal interviews to gain key insights into the target audience, the desired product format and design, and the most effective marketing techniques for a new product. Research also included an overview of the current market competition through secondary online sources. Finally, six books commonly read by advertisers and marketers and recommended by professors were studied to learn about the successful creation of an integrated campaign. These included: *Brand Aid* by Brad Van Auken, *Cracking the Code: Leveraging Consumer Psychology to Drive Profitability* edited by Steven Posavac, *Aaker on Branding* by David Aaker, *Brainfluence: 100 Ways to Persuade and Convince Consumers with Neuromarketing* by Roger Dooley and *Why We Buy: The Science of Shopping* by Paco Underhill.

From the research, it was discovered that there are currently few life document organizers in the marketplace. While there are effective organizers, people often feel too overwhelmed by the project to organize their own documents. It was found that a focus on the ease of organizing your life with Family Vault and the peace that results through increased family communication is the best way to persuade people to purchase and recommend the product. This insight led to the campaign “Peace of Mind,” which is targeted toward men and women who realize the need for planning and organization pertaining to life documents. This market is identifiable through their actions and associations with financial planning advisors.

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## **Introduction**

This thesis seeks to provide evidence and tactics for an integrated marketing communications campaign that would introduce and raise awareness for Family Vault, a new organizational product aimed at providing peace of mind to people prior to enduring unavoidable tragedies such as medical emergencies, deaths and natural disasters. The following sections introduce the product and brand as well as compile the research from multiple sources that qualifies the marketing decisions. The conclusion of this thesis includes examples of elements of the product itself and the genesis of the awareness campaign for Family Vault.

## **Chapter I: Situational Analysis**

Tragedies occur across the world each day. The Centers for Disease Control and Prevention (2015) found that over 820 deaths per 100,000 people occur each year in the United States. Moreover, in the years spanning from 1980 to 2010, 640 natural disasters were registered in the United States, killing 12,366 people and affecting 26,889,582 (“United States of America,” 2010). The most reported disasters were storms, including cyclones and hurricanes, claiming 392 of the incidents, and floods, claiming 132 of the natural disasters. The next largest category is wildfires, occurring 54 times over the 30 year time span (“United States of America,” 2010). These events take with them homes, offices and personal effects. The average life expectancy in the United States is 78.8 years (Centers for Disease Control and Prevention, 2015), which is more than enough time to accumulate necessary life documents pertaining to insurance, bank account information, medical needs, mortgages and more. All of this information is at risk of being unorganized and unprotected in the face of a disaster.

Family Vault’s key consumer benefit is that it solves this issue with ease by selling a pre-labeled expandable file scaled to fit inside an average sized lockbox. Family members no longer need to worry about finding information after a disaster. Family Vault provides security and protection, and it rids people of anxiety concerning their affairs. They can instead focus on moving forward while knowing their information is readily accessible in the case of an emergency.



Insights show that another benefit of this product is that it stimulates familial discussions pertaining to disaster planning, which in turn provides peace of mind to family members because of the increased communication.

It is important to create this product because a large percentage of the population cannot afford personal lawyers and financial planners to perform this work for them. There is also a generational trend toward do-it-yourself behavior, evidenced by the popularity of social media websites such as Pinterest and the plethora of financial advice counselors available by DVD or iBook to the common public. Dave Ramsey, chosen by Family Vault to endorse the product, is a well-known financial counselor who subscribes to the do-it-yourself trend. He currently hosts more than 8.5 million radio listeners weekly, has more than 1 million live event attendees and has written over 15 books with six of them “debuting on the New York Times best-sellers list” (“By the Numbers,” 2015). More than 2 million families have participated in his Financial Peace University, which teaches people how to get out debt and get organized. He is visible on all social media sites, with nearly 27,000 Pinterest followers, more than 630,000 personal Twitter followers and more than 465,000 followers for his radio show’s Twitter account, Ramsey Show. He also has more than 2.8 million Facebook friends (“By the Numbers,” 2015).

Using these numbers as a basis, the potential market size is quite large. Considering that Dave Ramsey’s followers are known to purchase any product or plan that he recommends, Family Vault could capture millions of sales in the first year. If a likely 5 percent of his event attendees and radio show listeners are interested in an organizer, the market can safely be estimated at 575,000

individuals. This does not include those who have been affected by deaths or natural disasters and seek an organizer to safe keep their documents. If 5 percent of those affected each year by natural disaster are included in the market size estimate, the market is roughly 620,000. However, it is probable that the market is in fact much larger.

The market is unrealized and not easily determined at this point since there are few competitors and little information available to guide marketers and consumers. When a secondary online search of key terms “planner,” “financial,” “life,” “document” and “organizer” was done on Amazon to investigate potential competitors, 11 products appeared. Of those, three were instruction pamphlets on how to “create your own” organizer, not providing the ease of a pre-labeled expandable file. Seven were classified as workbooks in which consumers can handwrite or type their personal information, including instructions on where to find the hardcopies of their personal documents. These products are similar to Family Vault, but they are not identical. Family Vault’s purpose is to organize original documents, not to reference them in a handwritten or typed book. One product, HomeFile: Financial Planning Organizer Kit, seemed to have a similar design and layout as Family Vault. It organized original paperwork into 22 categories, but it provided only the laminated divider cards for one to attach to his or her own hanging file folders. This product is not scaled to fit into a lockbox, and therefore does not provide security or peace of mind. It also does not provide all of required elements for the organization, such as the file folders themselves, and consequently it does not emphasize ease, as Family Vault does.

The secondary search was also performed on Google. Two products that were not discovered on Amazon appeared. The first, Home Organization Binder Kit, was a three-ring binder that claimed to “easily” organize home management essentials, including menus and cleaning schedules. This product was not intended to organize essential family documents that need to be kept both secure and readily accessible. The second product was For the Record: A Personal Facts and Document Organizer, which simply provided customers instructions and labels for hanging file folders, rather than encompassing the idea of providing ease through a pre-labeled, pre-formatted and self-contained expandable file as Family Vault does.

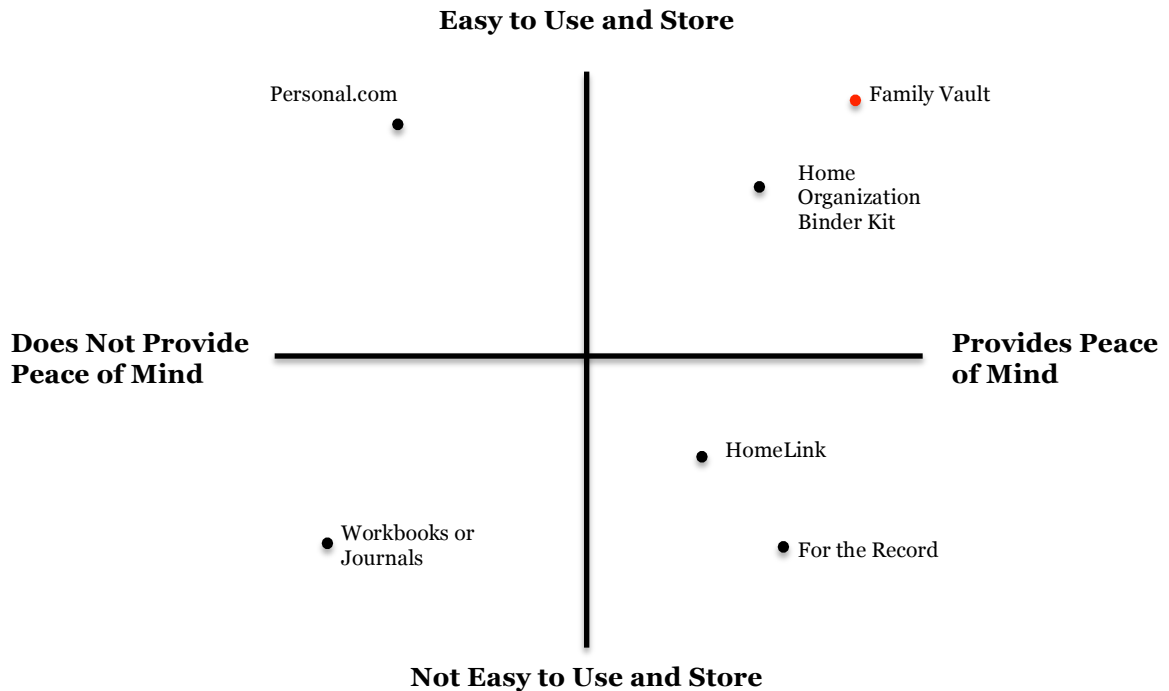
Finally, one online competitor was identified. Personal.com is an online storage space for consumers to store all of their digital information and passwords. The key benefit behind online storage is the ability to securely share sensitive information with others, but the purpose of this product is not to store necessary hardcopies of important personal documents.

Primary research was done because the secondary research on potential competition did not provide much insight into the market. The first form of primary research conducted was a Qualtrics survey distributed among 319 of the researcher’s social media and family contacts to gauge potential interest and obtain a surface level understanding of the correct target demographic. The questions asked were geared toward the overarching inquiries of whether or not people would purchase a document organizer and, if so, for whom would they purchase it. *For a view of the survey questions, see APPENDIX.* Of those surveyed, 94 percent had never heard of a personal document organizer before.

*See Table 1 in APPENDIX.* Of the five people who said they had heard of such a product, all learned about it through a financial advisor of some sort, supporting Family Vault's decision to use Dave Ramsey as a means of communication.

Van Auken, seasoned brand management, marketing professional and author of *Brand Aid* advised: "Knowledge about your competition is necessary because you want to uniquely 'own' an important benefit in your customer's mind" (2003, p. 34). It has already been clarified that Family Vault's unique brand benefit is to provide the end result of peace of mind to consumers through a pre-formatted, easily stored organizer, which captures the benefits of simplicity and security. However, marketers must be certain that these key benefits are a point of differentiation from similar competition. To do so, one should analyze the competition through comparison methods such as perception maps.

Comparing Family Vault to its competition in such a way proves that no existing competitor provides the essential key benefit of providing peace of mind in an easily obtained manner. See Figure 1 for a perception map of current document organizers. Home Organization Binder Kit is the only product within the same quadrant as Family Vault in the perception map. While it does provide peace of mind by organizing household documents, and it is a pre-labeled, easily used and stored binder, it is not meant to store important family documents. Rather, its purpose is to organize weekly plans necessary to organize a household. Family Vault is geared toward more substantial documents.



**Figure 1: Family Vault Perception Map**

Family Vault must differentiate itself within the marketplace by identifying the needs of unsatisfied consumers in the areas of ease of use and stress relief. It can do this by showing that it is the first new product on the market that keeps all of a customer's personal documents in one easily accessible and portable location that can be stored in a lockbox. As Christina Sparks, past marketing executive for The Coca-Cola Company and assistant professor in the Meek School of Journalism and New Media, said, "brands must prove to be different, special and better" (personal communication, March 3, 2015). Family Vault has an increased prospect of success because it is differentiated from competition. See Figure 2 for a summary of Family Vault's situational analysis.

<p style="text-align: center;"><b>Strengths</b></p> <ul style="list-style-type: none"> <li>• Easy to use</li> <li>• Portable/Storage</li> <li>• Emotionally appealing</li> <li>• Endorsed by financial advisor</li> <li>• Differentiated from competitors</li> <li>• Few competitors</li> </ul>	<p style="text-align: center;"><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>• Currently unknown market</li> <li>• Difficult market with which to communicate</li> </ul>
<p style="text-align: center;"><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>• Online growth</li> <li>• In-store sales</li> <li>• Direct marketing</li> <li>• Software development</li> <li>• Personalization</li> </ul>	<p style="text-align: center;"><b>Threats</b></p> <ul style="list-style-type: none"> <li>• Online trend</li> <li>• Not an essential item</li> </ul>

**Figure 2: Family Vault SWOT Analysis**

Having few competitors serves Family Vault well because often the first well-introduced product in a market becomes the standard by which other products are measured. Also, using Dave Ramsey as a starting point for the promotion of Family Vault propels the brand above and beyond competitors, as do the differentiating benefits of ease and peace of mind. Family Vault has many growth opportunities as well. Once the budget has expanded, the product could evolve to offer personalized formats for different lifestyles or life stages, including an online or computerized version. It could be sold through direct marketing, which targets those with a potential interest in an organizational product. Eventually, it could be sold in office and organizational stores.

There are far less weaknesses and threats for Family Vault than there are strengths and opportunities. The greatest challenge is overcoming the fact that organizers are not essential purchases. People can choose to create a system of their own, rather than purchase Family Vault. However, insights show that people fear the organizational process and want a product or person there to guide them. Family Vault does just that, explaining what documents need to be stored safely and where they should be filed. Currently there are few competitors in this market, and none organize and store important documents as effectively and efficiently as Family Vault. The goal of Family Vault's introductory campaign must be to first and foremost raise consumers' awareness of the product and the benefits it provides.

## **Chapter II: Product Introduction**

Family Vault is a self-containing, portable organizer for personal documents that need to be easily accessed in case of an unavoidable life event. It is pre-labeled, and it holds an instruction sheet teaching purchasers which documents should be safely stowed. It is simply a sturdy expandable file, but it is scaled to fit into a personal lockbox, providing security. These documents are arranged into the following sections within the organizer: identification, bank accounts, retirement, investment portfolio, loans and mortgages, personal insurance, property, safe deposit boxes, credit cards, medical information, funeral arrangements, Last Will and Testament, passwords and miscellaneous. Family Vault is not merely an instructional booklet on how to obtain the needed materials to organize one's documents. It provides all necessary tools for life document organization.

The organizer will take the form of an expandable file able to fit into a lockbox, because survey respondents asked for such a product. Not only did the survey support this decision, but a second form of primary research—more insightful conversations with multiple men and women brainstorming Family Vault, its format, its benefits and its consumers—did as well. Given the choice between a journal in which to handwrite information, an online personal URL, an organizational computer file for scanned documents, a flash drive on which to save documents, a binder or expandable file, a personal assistant and a phone



application, 56 percent of responders chose the expandable file option. *See Table 2 in APPENDIX.* The majority in each age category chose this format, and after many discussions and more investigative research, it was found that this is due to the inherent value and importance of original paper documents.

### **Need for Product**

There is a need, supported by the survey results, for an organizational tool that provides ease and peace of mind. Of those surveyed, 66 percent said their personal information was only “somewhat” organized, and 16 percent responded that their information was “not at all” organized, providing further support for the need. *See Table 3 in APPENDIX.* When asked whether or not family members would know where to access important documents in the event of a death or tragedy, the majority of those surveyed were unable to answer “yes.” This supports the need for a product to facilitate this conversation, thereby relieving stress and providing peace of mind to families.

A majority, or 76 percent, of young respondents age 18 to 22 answered that they would be interested in a product that helps them to easily organize their personal information, *as shown by Table 4 in APPENDIX.* That number grows to 83 percent of those surveyed age 23 to 30. *See Table 5 in APPENDIX.* One might think that middle-age adults have their documents more readily organized in preparation for life events, but of those surveyed, 77 percent of men and women age 31 to 50 are interested in an organizational product like Family Vault, *as shown in Table 6 in APPENDIX.* The percentage does not fall dramatically when compared to respondents who fall into a more senior-citizen category, age 51 to

70 or older, of which 70 percent state they are in need of an organizational product for their family's life documents. *See Table 7 in APPENDIX.*

When exposed to the brand, 68 percent of those surveyed said they would purchase this product, and 89 percent said that they think this product most appeals to middle age adults with families. *See Table 8 and Table 9 in APPENDIX.* Ninety percent responded that yes, regardless of their personal interest in the product, they would recommend this product to someone else, *as evidenced by Table 10 in APPENDIX.* Therefore, there is a consumer need that is not being recognized by current product offerings, presumably the effortlessness that people emphasized in their discussions and answers about the product. As David Aaker, well known marketing expert, wrote:

The brand home run is when the point of differentiation becomes a “must have” that defines a new subcategory (or sometimes a new category) and renders competitors irrelevant. A substantial group of customers will not consider any brand lacking the “must have.” (2014, p. 61)

Family Vault creates the “must have” of ease, while also providing consumers peace of mind and security, something few products accomplish. These key consumer benefits were discovered after discussions with both Robert Magee, marketing professor and persuasion expert, Christina Sparks, and through discussions with multiple men and women who possess such life documents. The insights from these conversations with community members led to the idea that men and women simply want the result of peace of mind, without the hassle of organizing. Family Vault will solve this by marketing the end result and emphasizing the ease with which the product leads consumers to that point.

## **Product Objectives**

The key to the information obtained in the survey is to understand that, as expert marketer and Director of the Integrated Marketing Communications program Scott Fiene advised, many individualized products could eventually stem from Family Vault since each age group has varying amounts of life documents due to differing life stages (personal communication, October 22, 2014). Magee advised that Family Vault could eventually grow to introduce individualized organizational products for various life stages (personal communication, December 8, 2014).

However, since Family Vault is a new product, the budget does not allow for consumer personalization during the first years of production. This is not a restriction deemed appropriate only by the limited new product budget, but also by the need to ensure consumers do not feel overwhelmed by choice within a new category of products. Roger Dooley, neuroscience and branding expert, said that, “it’s been known for years that too many choices can reduce consumer purchases” (Dooley, 2009, p. 28). He continued, “More choice isn’t always good and can actually reduce sales” (Dooley, 2009, p. 31). This is exponentially important when marketing a new product, such as Family Vault, because new products contain a certain amount of unavoidable ambiguity. Choices simply increase this uncertainty and therefore have the potential of reducing sales. Currently, each age group responds favorably to the “ease” of the product, so the brand will aim to emphasize this and retain the knowledge that choice and personalization are a viable future opportunity.

Since there are few competitors, it is difficult for Family Vault to set sales goals based off others' past sales. In an interview with Fast Company, Personal.com CEO and cofounder Shane Green claimed that the business has between 10,000 and 1 million users in its third year of business (Boyd, 2012). This is a large gap and does not aid Family Vault in establishing goals. No other competitors publish sales information. It is known that few startups or new products return a profit in their first year of sales. A Harvard Business Review article claimed that over 75 percent of really new products make less than \$7.5 million in their first year, including those really new products created and marketed by already established brand names (Schneider & Hall, 2011).

Even with limited sales, new products can break even, which is Family Vault's overarching goal. Family Vault's sales goal for the first year of operation is not based upon the lacking knowledge of competitors' sales but instead on Dave Ramsey's yearly media reach of nearly 15 million individuals ("By the Numbers," 2015). If only 1.1 percent of Ramsey's followers listen to his endorsement and purchase a Family Vault organizer, then the company can break even, reaching 160,000 sales. A loftier, yet still reasonable, sales goal is to aim for 5 percent of Ramsey's followers to take action, resulting in 750,000 unit sales.

### **Estimated Budget**

It is best to know the potential budget for both a small number of sales and a larger number. Family Vault will draw up a budget that reflects breaking even at a smaller number of sales and earning a profit if the larger sales goal is reached. The budget is based upon individual figures from printing stores and marketing

cost estimations. There should be more room in the budget when printing, packaging and product components are bought at wholesale prices rather than individual prices.

To create one durable, quality-made, pre-labeled organizer, Office Depot quotes around \$25. Expandable files cost between \$10 and \$17. Family Vault plans to spend around \$13 for a sturdy product. The instruction page printout on laminated cardstock using full color and images costs \$1, and the printing of labeled tabs, full color packaging labels and use of shrink-wrap costs \$11.

Although no specific fees for sponsoring Dave Ramsey could be found, numbers were established for Rush Limbaugh, the most popular radio talk show host, who is two rankings ahead of Ramsey (Brandt, 2010). Advertising on one of Limbaugh's shows can cost \$35,000, and a "successful" campaign of 45 advertisements costs around \$1.5 million (Brandt, 2010). This does not include the cost of creating the advertisements. Sponsorships, and thereby endorsements, typically cost slightly less than the production of a creative advertisement, which supports Family Vault's decision to promote in this way. However, for a conservative budget, Family Vault will assume a sponsorship fee of \$2 million, since specific numbers for Dave Ramsey were not found. This cost should be noted as fluid since brands can adapt the number of events and or shows sponsored to their budgets. When sponsoring an event, Family Vault must hang multiple banners to make the product visible at all times. The cost of a full color, retractable banner "ideal for sales conventions and demonstrations" ("Banner Printing," 2015) averages \$200. Family Vault must have at least two banners.

Family Vault will promote itself on social media as well, since Dave Ramsey and other financial and organizational leaders have a large number of online followers. Family Vault will concentrate its social media budget on Facebook advertisements, which Sparks said, “cost around 11 cents per click” (personal communication, January 22, 2015). Using Dave Ramsey’s 2.8 Facebook connections to approximate Family Vault’s number of yearly advertisement “clicks” yields a cost of \$330,000 for 3 million “clicks.”

Family Vault’s online presence will also be stimulated by search engine optimization, the cost of which ranges depending upon the specialist hired. Family Vault should hire a team that can both create a well designed website as well as work with search engines to ensure it is visible. The cost ranges from \$299 to \$1500 per month, as found in a brief Google search. Family Vault should estimate a yearly cost of \$15,000 for search engine optimization, \$1,000 per month and \$3,000 for fees and beginning costs.

Family Vault will incur an estimated marketing cost of \$2,345,400 within its first year if it follows the suggested campaign plan. The estimations were rounded up to the next largest number when making the budget to allow for uncalculated expenses such as employees and distribution costs. If during the first year Family Vault reaches its ambitious sales goal of 750,000 units sold (based upon Dave Ramsey’s media reach and impact), then the cost of production is \$18,750,000. Family Vault plans to charge \$39.99 and would therefore realize a profit of \$14.99 per unit sold. After subtracting marketing costs, this results in a total profit of \$8,897,100 to be reinvested into the brand and to cover the cost of employees and distribution. The only distribution costs Family Vault should

incur is to transport the organizers to Dave Ramsey events and to ship the organizers to online purchasers. FedEx charges around \$8 to ship one organizer, and trailer rental services to transport the organizers to events will presumably cost \$200 per event. The profit should cover these expenses, but Family Vault may need to charge online consumers its shipping costs.

To break even, the true objective for a new product's first year, Family Vault must sell 160,000 organizers. This is less than 1.1 percent of Dave Ramsey's followers. If Family Vault sells 160,000 organizers at \$39.99, the company still profits \$53,000, which can cover the distribution costs incurred and any unforeseen costs.

### **Chapter III: Target Audience**

An organization's strength is found in its customers, so a company must learn as much about them as possible to have a firm knowledge of its own foundation. A focused assessment of a company's target audience is the first step in creating the brand design. Very few, if any, brands can be all things to all people within a product or service category. That is why segmentation of the market and the determination of a target segment are imperative to marketing success. A brand's power is found in its focus on its customers, in particular those customers that are most likely to purchase the product or service offered by the brand (Van Auken, 2003, p. 24). Family Vault used its survey to understand the target demographic, and then the research was furthered through questioning to better understand the needs and wishes of those within the target segment.

These conversations proved that anxiety is associated with the lack of organization that people feel concerning life documents. The danger of not being organized is to leave family members unable to locate imperative documents after tragedies and disappoint loved ones in the most crucial times. Fifty responders (26 percent) that feel "somewhat" organized think about their documents two or three times a month. *See Table 11 in APPENDIX.* This number is more evenly distributed for those that feel "extremely" organized. They think about their documents less than once a month (22 percent), once a month (27 percent) and two to three times a month (27 percent). *View Table 12 in APPENDIX.* On the



other hand, those that felt “not at all” organized concerning their life documents largely never think about them (28 percent) or think about them less than once per month (38 percent). *See Table 13 in APPENDIX.* Insights were mined to determine that the more often one thought about his or her documents, the more anxiety he or she had concerning those documents and their organization, or lack thereof. This is credited to an internal need to feel prepared and to show love for family and friends through organization.

Those that do not feel organized at all and yet do not often think about their documents should not be targeted. They do not express this anxiety. Instead, Family Vault should communicate with those that feel somewhat organized. Those individuals have an awareness of the need for organization and likely attribute anxiety to their lack of organization, or preparation. Those who feel highly organized might not be motivated to purchase an organizational aid because they lack need. Those who do not feel organized at all might feel too overwhelmed to begin the process of locating and organizing important documents, or they might not acknowledge their need. “Organizations exist for one purpose—to meet human needs” (Van Auken, 2003, p. 23). Those that are somewhat organized have a need for a product’s assistance and have knowledge of their need on some level. Therefore, Family Vault should target them and meet their need.

The majority of those ages 18-22 think about life documents less than once per month (29 percent). *See Table 14 in APPENDIX.* When filtered to determine the distribution of those respondents ages 23-30, the results prove that this age group thinks about their life documents more often. The majority, 28 percent,

stated they think about their documents once per month; 17 percent answered that they think about them once per week, and 11 percent responded that they think about them two to three times per month, two to three times per week, and daily. It should be noted that only 18 respondents fell into this age category. *See Table 15 in APPENDIX.* A more applicable source is found in the 84 respondents age 31 to 50, whose majority, or 29 percent, thinks about their life documents two to three times per month. Fourteen percent stated they think about their documents two to three times per week, and 10 percent said they think about them daily. *See Table 16 in APPENDIX.* The majority of those ages 51 to 70 and older said they think about their documents two to three times per month as well, however they are closely followed by the categories of “less than once per month” and “once per month.” This age category only had 12 people choose the higher thought frequency options combined. *See Table 17 in APPENDIX.* If one were to follow the results of this survey, the age category that seems most likely to be interested in an organizational aid is age 31 to 50, traditionally the age of men and women with families for which to provide.

However, 248 of the survey respondents were women, meaning the answers to this survey are skewed to show the thought patterns of women age 31 to 50 more than men. The largest difference between men and women was found in the two to three times per week category. Where 9 percent of women said they think about their documents that often, a more substantial 15 percent of men said they think about them that frequently. *See Table 18 in APPENDIX.* Paco Underhill, hailed as the “Sherlock Holmes” for retailers, said that this is explained by men’s inherent need to provide and protect their families (2009, p.

105). He wrote, “Part of being Daddy is being the provider, after all. It goes to the heart of a man’s self-image” (Underhill, 2009, p. 105). Cal Mayo, Oxonian and lawyer, touched on this point during a discussion. He suggested that Family Vault should be targeted to new families. He advised that he did not begin to think about organization of important documents until he became a father (C. Mayo, personal communication, February 20, 2014). However, modern families are composed of male and female providers, so the product should not merely focus on the traditional male need to care through preparation. The purpose of Family Vault is to facilitate communication between family members about organized documents, thereby providing peace of mind to everyone within the family unit, regardless of who is considered to be the head of the family.

This survey represents a small sample of individuals and is not a national survey. It was distributed through social media accounts and emails. Based upon the researcher’s connections and contacts, it can be safely assumed the majority of respondents live in the southern region of the United States and belong to either the middle class or upper middle class. These responses are therefore knowingly biased and not representative of the nation, but they do give insight into who might be most interested in a life document organizer. Based upon the survey results, as well as conversations with numerous individuals, the demographic of the target audience is calculated to be men and women age 31 to 50 who feel somewhat organized about their life documents.

Fiene recommended not only to use demographic results, but to also incorporate logic and intuition to identify the target market (personal communication, February 11, 2015). He said, “Make sure Family Vault targets

those who would logically have interest in a product like this” (S. Fiene, personal communication, February 11, 2015). He acknowledged that this product appeals to a very niche market, not simply all people age 31 to 50 who feel “somewhat” organized pertaining to their family’s documents (S. Fiene, personal communication, February 11, 2015). Intuitively, those who have interest in a product that easily organizes documents in one safely contained, portable location, providing peace of mind in the case of an unavoidable life event, are those that have recently witnessed such an event or that are in the midst of restructuring their financial and personal documents. As advised by Fiene, those individuals can be identified by their actions (personal communication, February 11, 2015). People who perform Internet searches for terms like “financial planning,” or visit financial websites such as “CNN Money” often think about their documents and financial records more often than others who are uninterested in such topics, as do those who seek help through financial counselors and community leaders both online and off (S. Fiene, personal communication, February 11, 2015). Many discussions with individuals led to the discovery that personal document organization is linked within people’s minds to financial security and the anxiety that envelops people who do not feel prepared for the future.

In summary, Family Vault must target people who are aware of the need for document organization, financial security and preparation for the future. The survey results show that the majority of those people are middle-aged males and females who presently feel “somewhat” organized. Their interests, actions and current life events can identify them. If one were to profile a member of the

influential target audience, he or she would be a middle-aged individual who has a young family and thinks about the security of his or her personal finances and family. He or she follows advice sought from financial community leaders and life coaches. He or she researches ways to improve his personal organization and preparation, and he or she shares this advice with others. He or she is an influencer, leading members of other demographics to follow his or her actions and product purchases. The target audience is simply those that want to facilitate communication between members of the household in times of crisis, times when it is possible for families to pull apart and stop communicating, through preparation and organization.

## **Chapter IV: Strategy and Positioning**

In developing the strategy and positioning for Family Vault and its campaign, the AIDA model was followed to create an integrated campaign. This model emphasizes the importance of capturing consumers' awareness, interest, desire and actions. Although many authors will tell you that you "should spend more on advertising" if "you are building a new brand or launching a new product or service," (Van Auken, 2003, p. 108) it is also known that new brands and products do not have room in the budget to create well-made television commercials or other forms of advertisements that may not work. It is a better choice to invest in a more sure found method of creating awareness, which is the most important goal of advertising in the first year of production (Van Auken, 2003).

To introduce the brand effectively and create awareness within a target audience that is likely to follow through with the AIDA model, a well-known and trusted endorser within the market was chosen. Steven Posavac, marketing professor at Vanderbilt University, wrote: "At the inception of a brand the most important goal of marketing is to develop awareness" (Posavac, Sanbonmatsu, & Jain, 2012, p. 56). Those brands that receive "early consideration in the judgment and choice process" due to high awareness are "much more likely to be chosen compared to other alternatives" (Posavac, Sanbonmatsu, & Jain, 2012, p. 53). Sparks (personal communication, December 5, 2014) and Magee (personal

communication, December 8, 2014) suggested that one way to create this awareness is to have Family Vault endorsed by a financial advisor with a large clientele. This endorsement not only serves to create awareness, but it more importantly serves as a profound testimonial. Testimonials, or personal anecdotes about a product, assign a name, face and story to the brand and “play to the way our brains evolved” (Dooley, 2009, p. 177). They make the product more “convincing and memorable” (Dooley, 2009, p. 177). Anecdotes are even more convincing when “someone we trust tells the story,” (Dooley, 2009, p. 175) and, when deciding what to use to help organize financial and life documents, people trust the expertise of a financial planner.

The task of organizing important documents is often considered overwhelming on its own, notwithstanding the decision of which aid to use. To use a widely regarded, or famed, financial advisor as an endorser would serve to clarify that Family Vault is the easiest to use, most helpful and remains a worthwhile investment. Brands need to use some sort of expertise to “winnow down the possibilities” (Underhill, 2009, p. 231). “Often consumers are looking for the most rudimentary guidance...Matter of fact, many are outright relieved to let go of the burden of decision-making” (Underhill, 2009, p. 231). Furthermore, “consumers love the idea” that what they are about to buy has been “pre-vetted” (231).

A perfect endorser for Family Vault is Dave Ramsey, an American financial author, radio host, television personality and motivational speaker. He encourages people to get out of debt and to organize themselves, and he prides himself on speaking in a clear and simple manner, easily understood by followers

of all education levels, which echoes Family Vault's purpose. His mission statement is to "provide biblically based, common-sense education and empowerment that gives hope to everyone in every walk of life" ("Dave Ramsey," n.d.). His radio show, "The Dave Ramsey Show," is the "third largest nationally syndicated Radio Talk Show, with more than 550 affiliates nationwide speaking to more than 8 million listeners weekly" ("Dave Ramsey," n.d.). Dave travels and gives motivational speeches and advice on investments, real estate, property insurance, health insurance and tax services ("Dave Ramsey," n.d.). Four of these five topics have documents pertaining to them that need to be organized within the Family Vault organizer. He also offers the opportunity to sponsor his live events, and brands that choose to do so are not only able to set up sales booths but are also publicly endorsed by Dave to his audience. As stated on the company's website:

Dave only endorses companies with a valuable product or service to offer. He serves and protects his fans. Dave's recommendation is often all that's needed to move his entire audience to act. Endorsements at our live events introduce fans to your brand and leave a clear, positive impression on thousands. ("Dave Ramsey," n.d.)

Simply put, Dave Ramsey is a trusted expert, one who would serve Family Vault by first increasing awareness, then interest, then desire and finally, action, or purchase within his audience, a target already known to emphasize the importance of organization and financial security.

In positioning Family Vault as a product to be trusted with one's most important information, the name "Family Vault" was chosen because of the



associations within the words “family” and “vault.” It is not merely an organizer. This product is one that works to help families overcome one of the most difficult challenges, planning for dreaded, yet likely, life events. “Family” means love, care and unity. Its connotation points to the need to alleviate stress by preparing and storing documents in one place to protect one another from pain or anxiety. “Vault” means security, or safety, much like a bank. It emphasizes the product’s ability to fit into a lockbox, and therefore unite family in a safe, indestructible form.

Family Vault’s logo is simply an image of the two words that compile its name, ensuring that its positioning is consistent. It emphasizes family through its incorporation of a typical American family and the heart. It appeals to the inherent need for fathers and mothers, for the target demographic of men and women age 31 to 50, to care and provide for their families through securing paperwork. Second, it uses black, bold lettering, which is easily read, as advised by Darren Sanefski, graphic design professor in the Meek School of Journalism and New Media (personal communication, December 5, 2014). However, the font choice can still be classified as “fun,” to ensure the product is known as an easy use product. The word “family” is overarching, placing a large emphasis on the emotional benefits and communication, or peace of mind, the product provides. The color scheme was chosen because of Sanefski’s recommendation to use high contrast colors, such as black, white and red (personal communication, December 5, 2014), and Sparks’ advice to incorporate green, a symbol of money (personal communication, January 22, 2015). The red circle symbolizes the vault, organizing and securing the financial and personal documents important to the

family within it. *See Figure 3 and the creative rationale in APPENDIX for an image and explanation of the logo.*

The “Peace of Mind” campaign follows the AIDA model, or strategy, by using only two written messages with consumers, both geared toward emphasizing the key, differentiating benefits of the product. Limiting the messages helps Family Vault develop an easily identifiable profile, serving to eventually boost awareness. The headline used on promotional banners at Dave Ramsey events, online and on the product itself is, “Family Vault: The Easiest Way to Organize Your Personal Documents in Preparation for Your Family’s Tomorrow.” The tagline, used as a secondary message throughout the campaign, is, “Organize Today, Relax Tomorrow.” These messages resonate with the target audience because they hone in on Family Vault’s ability to provide peace of mind to families once preparations have been made and communications have been enabled.

The messages are reliable and honest, much like the endorser, positioning Family Vault as a product and a brand that cares about its customers. It works to make the tough part of preparation, the organization, a minimal piece of the overall puzzle. However, the genesis of a campaign is rather experimental and therefore must be measured at the conclusion of the year to determine what efforts worked and what did not.

## **Chapter V: Brand Introduction**

“The American Marketing Association describes a brand as a ‘name, term, sign, symbol or design, or a combination of them intended to identify the goods and services of one seller or group of sellers and to differentiate them from those of competition’” (Van Auken, 2003, p. 5). The brand is more than that though. It is an entire experience. Van Auken continued, “In brand positioning or design, there are four components to be addressed: target audience, brand essence, brand promise and brand personality” (2003, p. 15).

The brand’s target audience was previously articulated. The brand’s essence is, in short, one word that articulates the brand. Family Vault’s essence is “helpful.” Family Vault is meant to be an unintimidating way to easily achieve needed organization to help families. The brand strengthens itself by making, and keeping, a promise to consumers. As Van Auken advises, “Your brand’s promise should leverage all three of the following: a compelling point of difference in the consumer’s mind, your organization’s unique strengths and your competitor’s vulnerabilities” (2003, p. 96). Family Vault’s brand promise is to achieve organization with ease and therefore offer peace of mind to consumers, in one readily made, portable package, unlike competitors. Finally, a brand should have a personality. It is important to make the brand relatable and likable. A brand has a strong personality if consumers can assign adjectives normally used to describe

a human being to the brand. Family Vault aspires to be appointed the characteristics of helpful, caring and protective.

Family Vault's essence, promise and personality are identifiable by its unique name, assigned to both its brand and its product. Van Auken suggested that products should not have multiple levels of names; rather:

Many organizations opt for associative descriptive names. Associative descriptive names, which may be partly descriptive, usually allude to a key brand benefit... These names tend to work quite well and deliver the added benefit of immediately alluding to the brand's benefit. (2003, p. 63).

Family Vault is an associative descriptive name and it alludes to the brand's benefit. Magee spoke to the strength of the name and said that it would be relatively simple to trademark it because of its descriptive traits (personal communication, December 8, 2014). The name promises to provide family providers peace of mind by securing their documents in an easily obtained, organized manner. It does this by caring about the security of consumers' documents, helping consumers organize them and protecting consumers in the process from the anxiety that stems from misplacing or not knowing documents' locations.

The brand identity and brand name relate to both emotional benefits, by mentioning consumers' families, and to functional benefits, by using the strong word "vault." Aaker emphasized the strength of a brand that appeals to both emotional and functional benefits:

The strongest brand identities have both functional and emotional benefits. A study by Stuart Agres supports this assertion. A laboratory

experiment involving shampoo showed that the addition of emotional benefits (you will look and feel terrific) to functional benefits (your hair will be thick and full of body) enhanced the appeal. A follow-up study found that 47 TV commercials that included an emotional benefit had a substantially higher effectiveness score (using a standardized commercial laboratory testing procedure) than 121 commercials that had only a functional benefit. (2014, 57)

Family Vault emphasizes both benefits through its identifying symbol, or logo, found on all of its touchpoints with consumers, ensuring that the brand experience is both consistently and correctly communicated with consumers. “The brand experience is created by brand touchpoints that occur any time a person in the marketplace interacts with the brand.” (Aaker, 2014, p. 89) It is important that the brand experience is “on brand” (Aaker, 2014, p. 89), meaning that its name, symbol, touchpoints, advertisements and even color associations work to effectively communicate its benefits and purpose.

Family Vault has the potential to be a strong brand for two reasons: it appeals to personal peace and empowerment, and it is designed to be attractive to both major types of shoppers: the spendthrift and the tightwad. Van Auken observed:

The most powerful brands and products are those that help people stay healthy... brands and products that can help people with the following are extraordinarily powerful: a sense of purpose, a sense of self-worth, personal empowerment, a sense of well-being, healthy, trusting relationships, a sense of community, peace, hope or joy. (2003, p. 114)

Family Vault provides a sense of empowerment and peace by helping rid consumers of the anxiety that consumes unorganized individuals and by assisting them with preparations for the future. This benefit appeals to spendthrifts, those that are more willing to purchase products because of their emotional appeal. “Unlike tightwads, spendthrifts are concerned both about utilitarian issues as well as how the product or service will make them feel” (Dooley, 2009, p. 196). The use of bright colors and a fun font in the logo appeals to spendthrifts because they are known to buy fun, easy use products (Dooley, 2009, p. 196). Moreover, the product and brand appeals to tightwads as well because of its emphasis on the utilitarian benefit of ease. “Most products combine a variety of characteristics, and the utilitarian ones may be most important to emphasize when selling to tightwads. Appeal to important needs” (Dooley, 2009, p. 194). There is no need more important than that of ease when selling a product that tackles a task deemed daunting by most, and Family Vault addresses this.

Family Vault appeals to one of the most primary, important needs articulated in Maslow’s hierarchy of needs: safety. It also speaks to emotional benefits through its provision of familial love, also noted in Maslow’s hierarchy. Its symbol, name and touchpoints all effectively communicate these benefits in a descriptive manner. The brand has laid the foundation to sell to both major types of shoppers while simultaneously making itself appealing to all in the target audience. Its essence, promise and personality are consistently communicated through its name and symbols, part of the identification of its brand, aiding in brand awareness and identification amongst the target audience.

## **Chapter VI: Marketing Mix**

The “marketing mix” is compiled of four elements: the product, price, placement and promotion. Underhill wrote, “In retrospect, one of the most important things to learn is this: How you present your ideas and information is just as—or more—important as the ideas themselves” (2009, p. 53). In this case, the new product is the idea, and how Family Vault presents its organizer to the market is more important than the organizer’s functional and emotional benefits combined. The product will not sell unless consumers are able to understand what the product offers. This presentation of the product is achieved through the marketing mix.

### **Product**

Family Vault is a sturdy organizer, created with a durable expandable file, a laminated instruction sheet and laminated cardstock labels. It is so made because Sanefski acknowledged that consumers are purchasing this organizer to store their most important documents. They need to feel that the product is worthwhile of this responsibility (personal communication, December 5, 2014). This also stands to differentiate the product from less expensive competitors. Underhill found this distinction important:

The normal instinct is to buy what’s cheaper. But if a store sets itself up to educate shoppers, even just a little, a certain number of them will

spend more than what is absolutely necessary. If given a choice of three brands, or three models, and given the chance to pit one against the others, the shopper will at least have a sensible reason for choosing the better item. (2009, p. 191)

Shrink-wrap packaging allows for visibility of the product and an easy comparison to less well-made competitors (D. Sanefski, personal communication, December 5, 2014), and the weight of the organizer allows for shoppers to feel the substantial quality of the product itself.

In the upper left, there is a picture of a family experiencing peace of mind, gazing toward the center of the document, working to attract attention. In the center there is a summary of the product's attributes in a bulleted list, titled "Family Vault: The Easiest Way to Organize Personal Documents in Preparation for Your Family's Tomorrow." The list includes: "Self-Containing and Portable," "Pre-labeled for All Family Documents," "Scaled to Fit in an Average Lockbox," "All Parts Included," "Easy Organization Instructions Inside" and "Minimal Time Investment for Lifelong Peace of Mind." This list of attributes was so worded to accentuate the ease of the product and the peace of mind it provides consumers. There is also a large "New Portable Organizer" sticker to the left and slightly below the product highlight list, because "new" and "free" are novelty terms with appeal hardwired into our brains (Dooley, 2009, p. 165 & p. 168). Also, this sticker sets apart the most noticeable differentiating benefit from the other product attributes, its portability. The brand logo is placed on the bottom right. The back of the product features an "About Family Vault" section to help consumers feel an emotional connection to the brand, important when



attempting to build a brand. Sparks advised that brands should always insert drama because people love to feel as if they are part of a story (personal communication, March 3, 2015). The “About Family Vault” section achieves this feeling by telling the story of the brand’s inception.

The layout of the packaging labels is important because consumers tend to view products and advertisements left to right in a Z-formation, meaning that ideally, an attention-grabbing photograph should be placed in the top left, information to be read should be placed in the center, and the brand’s logo should be placed in the bottom right (D. Sanefski, personal communication, December 5, 2014). Also, consumers tend to look where people in pictures are looking or pointing, so it is important for the featured family’s attention to be in the direction of the product highlights (D. Sanefski, personal communication, December 5, 2014). *For an image of the product packaging labels and an explanation of them, see Figure 4 and Figure 5 and the packaging creative rationale in APPENDIX.*

The colors incorporated in the product are critical, because “colors have a significant impact on people’s emotional state” (Van Auken, 2003, p. 67). Following this information, the organizer itself is black, both to signify the legal importance and privacy needed for important life documents and to increase contrast, as advised by Sanefski (personal communication, December 5, 2014). The brand logo features two of Americans’ favorite colors, green and red (Van Auken, 2003, p. 68). Any messaging is typed in a serif font, using both upper and lower case letters, featuring red lettering on a white sticker. This format makes it clear, easy to read, simple and it sets it apart from the black background (D.

Sanefski, personal communication, December 5, 2014). Van Auken supported the font color choice when he wrote that the “most legible of all color combinations” included red on white (2003, p. 68). However, the “About Family Vault” section features black lettering on a white background because it consists of more dense paragraphs. Black font on a white background is known to be the most easily read for eyes of all ages.

Although the target market consists of a middle-aged demographic, the product and packaging must appeal to older individuals as well. “By 2025, nearly one fifth of all American people will be 65 or older. You also realize what that means: old baby boomers. A lot of old baby boomers” (Underhill, 2009, p. 137). The survey responses suggest that while older individuals may not purchase this product for themselves, they are interested in purchasing it for their family members and children. Ninety percent of responders said they would recommend the product to others, mainly those with new families and growing families. Also, influencers, men and women interested in financial and document security, are targeted because they have the effect of persuading people in other age and interest categories to purchase this product. Therefore an older secondary market should be considered in the design. Underhill found that:

Human eyes begin to falter at about age forty, and even healthy ones are usually impaired by their sixties. With age, three main ocular events take place: The lens becomes more rigid and the muscles holding it weaken, meaning you can’t focus on small type; the cornea yellows, which changes how you perceive color; and less light reaches your retina, meaning the world looks a little dimmer than it once did. (2009, p. 138)

Underhill explains the biological degradation of eyes that will impact the design and packaging elements, explaining why “things are going to have to be larger—more use of graphic images, bigger and better signage and packaging” (2009, p. 141). He continues to support Family Vault’s choice of black, white and red, with minimal green: “Packaging, signs and advertising will have to be designed for maximum contrast, not just for nuanced interplay of colors. We’re going to have to see a lot more black, white and red and a lot less of any other hue” (2009, p. 141).

The easy-to-read design is continued throughout the product, including the tabs and instruction sheet. The pre-labeled tabs within the expandable file are marked as follows: “Identification,” “Bank Accounts,” “Retirement,” “Investment Portfolio,” “Loans and Mortgage,” “Personal Insurance,” “Property,” “Safe Deposit Boxes,” “Credit Cards,” “Medical Information,” “Funeral Arrangements,” “Last Will and Testament,” “Passwords” and “Miscellaneous.” The labels are so chosen because of the survey responses and secondary research, which show that the majority of people have documents pertaining to these categories. The instruction sheet inside includes simple directions explaining what documents should be found within each folder, helping consumers and supporting the brand’s essence, promise and personality. Both the labels and the instruction sheet feature black font on a white background, because “black on white is the easiest to read, both on paper and computer screens” (Van Auken, 2003, p. 68). Red highlights, such as borders, are used because red can cause people to lose track of time, enhancing the perception of the Family Vault organizer’s ease of use. Also, red is a “hard” color. It is easy to focus upon and creates excitement,

helping organization to seem like less of a daunting chore (Van Auken, 2003, p. 67 & p. 68). *For an image of the instruction sheet and an explanation of the design, see Figure Four and the interior components rationale in APPENDIX.*

## **Price**

Family Vault is a new product in a relatively slim market and therefore needs to determine a price based upon secondary research. Dooley wrote that it is interesting to handle the challenge of determining how to price new products, such as Family Vault, for which no “anchor price” has been established (2009, p. 15). He continued: “Anchor pricing for such products is quite fungible, and marketers would do well to avoid inadvertently establishing a low anchor price” (Dooley, 2009, p. 15). The survey responders suggested that somewhere between \$30 and \$40 is an accurate price range for Family Vault. Thirty-six percent of responders, said they would pay between \$16 and \$25 for the organizer, but a close second, 35 percent, selected they would pay over \$30 for the product. *See Table 19 in APPENDIX.* Dooley said the key is to avoid round numbers in pricing. “I usually price products just below the next dollar increment” (2009, p. 20). His research showed that while, “people may not be fooled by the more precise price, they may attribute a higher value to the product itself” (Dooley, 2009, p. 21). The budget estimates suggest that to succeed the product must be priced at above \$35, which is in line with Dooley’s advice and the survey results.

This organizer will contain life’s most important documents. People will pay a more premium price if they believe in its ability to help them (S. Fiene, personal communication, February 11, 2015), as noted by competitors’ price

range of \$3.99 to \$65. Family Vault will sell its organizers for \$39.99, an odd number at the higher end of the price range given by survey responders, following Dooley's insights (2009, p. 21). This results in a profit of \$14.99 per organizer used to cover marketing and distribution costs.

### **Placement**

Family Vault chose one trusted physical location to sell the product, Dave Ramsey events. It will offer follow-up sales opportunities and messages online. As Sparks said, "About 87 percent of people trust a friend's recommendation," (personal communication, December 5, 2014) and Dave Ramsey is considered a friend by his large number of fans ("Dave Ramsey," n.d.).

Traveling to sponsor and be endorsed by Dave Ramsey is a very controllable way to introduce the new product and a strong way to begin the campaign (S. Fiene, personal communication, February 11, 2015). It reaches people who express interest in the topic of obtaining structure and organization while ensuring that precious marketing dollars are not wasted on advertisements that do not reach interested members of the targeted audience. If entire audiences purchase the organizer and Family Vault is not prepared for more sales, then there is no requirement to continue to the next event. On the other hand, if audiences do not purchase at the event, they still have the opportunity to see and hold the product. They then can be directed to the website, which offers the opportunity to purchase online. The key to placement within the first year of a new product is to not flood the marketplace and stores with unsure sales forecasts.

## **Promotion**

In the first year of promotional efforts, Family Vault will promote itself in three methods only: sponsorship of Dave Ramsey, social media advertisements and accounts and search engine optimization for the website. These efforts were found through interviews to be the most cost-effective and sound ways to reach those with the need and want for easy organization and peace of mind. Since Family Vault targets a very niche market, investments such as online banner advertisements and direct mailers, typically known to increase brand awareness, are not necessarily worthwhile for a first-year budget.

The beauty of advertising and promoting Family Vault through a Dave Ramsey's live event sponsorship is that the cost is fluid and the awareness and knowledge about the product is increased within the target market. Ramsey will host 20 motivational and educational seminars in the next three months alone and expects to speak with over 1 million people within the year. Sponsors have the ability to pick and choose what events they would like to host, but they could potentially reach millions of people through a simple endorsement arrangement. At these events, Family Vault will gain interest through its banners.

Even if companies do not believe their banners or advertisements are seen, it is dire to remain visible. "Even when your ads aren't consciously noticed, your branding message is still having an impact. The key point for marketers is to keep your brand visible even when people don't seem to be paying attention" (Dooley, 2009, p. 61). Although people may not intend to purchase products offered for sale at Dave Ramsey's events, marketers must remember, "more than 60 percent of what we buy wasn't on our list" (Underhill, 2009, p. 47). "And no, this isn't the

same as an impulse purchase. It's triggered by something proposing the question, 'Don't you need this? If not now, then maybe in the near future?'" (Underhill, 2009, p. 47). Dave Ramsey discussing the need for such a product is enough to trigger the question in audiences' minds, and the banners visually reinforce this message.

The banner's job is to communicate first and foremost the ease of the product, following advice found within a chapter of Posavac's *Cracking the Code*: "When promoting an RNP [really new product] is it important that marketers emphasize ease of use while not withholding benefit information" (Hoeffler & Herzenstein, 2012, p. 38). We are in an age of communication overload, so banners must not be cluttered so that the message is easily understood and absorbed (Underhill, 2009, p. 74). A banner is successful when it has presented a message in a "clear, logical fashion—the beginning, the middle, then the ending" (Underhill, 2009, p. 63). This is done by listening to Sanefski's expertise that people read and view advertisements left to right (personal communication, December 5, 2014). Underhill supports this design advice, "If you don't get their attention first, nothing that follows will register. If you tell too much too soon, you'll overload them and they'll give up. If you confuse them, they'll ignore the message altogether" (2009, p. 64). Banners should grab attention, then tell about the product, and then wrap-up by showing the brand's identifying images, its logo and URL, in order to tell audiences the perfect amount of information. These banners should be kept simple, with the message obvious. It should remain uncluttered (Dooley, 2009, p. 254-255).

Family Vault's banner will continue the brand experience by mimicking much of the packaging details. The images, colors and font choice, otherwise known as the brand's identifying features, will remain static to increase brand recognition. The bright logo set against a dark background will serve as both the attention-grabber as well as the identifying information. It will be followed by the message and information in the center, and then the logo will be reinforced at the end once again. Some banners will feature the campaign's tagline, "Organize Today, Relax Tomorrow" because it relays the message that an immediate consequence of organization is relaxation, or peace of mind. It also hints to the ease of the product by insinuating that it only takes one afternoon, or one day, for complete organization. Other banners will feature a bold headline differentiating Family Vault from competitors: "Family Vault is the easiest way to organize personal documents in preparation for your family's tomorrow." These words signify the ease of Family Vault and the emotional benefits of protecting your documents for your family. Finally, at the end of the brand's message there will be the website's URL, because when promoting a new website, a brand should print its URL on everything (Van Auken, 2003, p. 150). *For an image of the banners to be used by Family Vault at Dave Ramsey events and an explanation of the design, see Figure 7 and Figure 8 and the creative rationale in APPENDIX.*

Second, Family Vault will invest in highly targeted Facebook advertisements and create Twitter and Facebook accounts. "Social media is a very attractive platform for encouraging selective consideration of brands, because increasing the brand's touchpoints with consumers serves to increase the



frequency and recency of activation of the brand (Posavac, Sanbonmatsu, & Jain, 2012, p. 57). When the frequency and recency of the brand is increased, so is the brand awareness, the number one goal for new products in the marketplace.

Seventy-one percent of online adults use Facebook, and although many have multiple social media accounts, Facebook remains the “home base,” attracting the most daily interactions and most users, according to Pew Research (Duggan, Ellison, Lampe, Lenhart, & Madden, 2015). Family Vault plans to use Facebook as its “home base” for social media, sharing organizational tips and trends as well as articles concerning financial and life preparation. This is also another platform to share photos, videos and messages from Dave Ramsey events, supporting the product’s placement and propelling business. Twitter is an easily used secondary form of social media that syncs well with Facebook accounts, so Family Vault will enlarge its social media presence and create two-way communication with consumers by using it as well. Sparks noted that people age 31 to 50, the target age group, are technologically savvy and are often “addicted” to their smart phones and social media accounts (personal communication, January 22, 2015).

Facebook is a medium that is sure to reach those in the target audience because it can effectively pinpoint those with an interest in products like Family Vault. Facebook has the ability to post advertisements for Family Vault visible to people that “like” Dave Ramsey or other financial planning sites or leaders, as well as those who have recently “checked in” at a Dave Ramsey event or listened to one of his podcasts. A Facebook advertisement’s purpose should be to direct viewers to the website with one click. It should remain basic and easy to follow.

Family Vault's Facebook advertisement will simply include an attention-getting, relatable photo, an engaging message and the brand's logo and URL.

It is imperative that the individuals in pictures used in advertisements relate to the target consumer's ambitions. This is achieved by featuring an image of an ideal family, one that has obtained peace of mind and easy organization. Brands strive to be identifiable with consumers by incorporating diverse physical markers of gender and race and also by using source clues such as the family's situation or the role of the caregiver in the photograph (Brumbaugh, 2012, p. 67). When a consumer identifies with an advertisement or product his or her affinity for the brand increases, thereby increasing sales (Brumbaugh, 2012, p. 67). *For an image and explanation of Family Vault's Facebook advertisements, see Figure 9 and Figure 10 and the advertisement rationale in APPENDIX.*

Search engine optimization, or SEO, achieves the same goal as Facebook advertisements and social media accounts. It is a way to increase visits to one's website by naturally ensuring it appears at the top of search results, hence increasing awareness. Van Auken wrote:

In January of 2001 the NPD group, a leading marketing information provider, conducted a study to compare the effectiveness of search listings versus banner ads and titles. Search listings outperformed banner ads and titles 2 to 1 or more on awareness. (2003, p. 147)

Awareness is the number one goal for new products, so Family Vault's website needs to be at the forefront of online searches. This is achieved by one of three ways: "doing it yourself with the help of online site promotion resources, hiring a company that specializes in search engine and directory placement, or doing

both” (Van Auken, 2003, p. 147). Van Auken recommended doing both because of the increased sophistication amongst search engine ranking (2003, p. 147).

FamilyVault.com should be the first website to appear when key terms such as “family,” “protection,” “document,” “safety,” “organizer,” “financial” and so on are searched. At the beginning of a campaign, hiring a firm that performs this task can help to boost website visits and online sales without a large investment.

The brand’s URL printed on the packaging and banners and linked to the Facebook advertisements and search engine optimization will direct consumers to Family Vault’s integrated website. “The organization that ignores the Internet as a brand-building medium does so at its own risk. Websites are effective at building brand relevance, differentiation and loyalty” (Van Auken, 2003, p. 137). The Internet can even be said to favor smaller companies, such as Family Vault, because they can deliver coherent brand messages, environment and experience on the Internet (Van Auken, 2003, p. 138).

A website should be interactive, engaging, informative and helpful (Van Auken, 2003, p. 139), while also achieving one or more of the following objectives: increase accessibility, reduce cost of doing business, enhance customer relationships, build the brand, or create the opportunity to expand the customer relationship (Van Auken, 2003, p. 139). Family Vault’s website possesses two main objectives: to increase accessibility, meaning to increase customers’ knowledge about the product and ability to purchase the product, and to build the brand in a cost-effective manner. For a brand-building site the domain name should be the brand name. There should also be a story woven in

telling the brand's background and heritage. All of its pages should look and feel consistent, and ideally the brand name and logo should appear in the top left corner on each page. The website exists to create a community and an emotional connection, and following these steps does just this (Van Auken, 2003, p. 144). Every page should have a home button, a search button and a contact us button. There should also be powerful content that is "detailed, well-organized and up-to-date," (Van Auken, 2003, p. 141) and the home page should effectively capture users' attention while communicating the "purpose, personality and point of difference" (Van Auken, 2003, p. 141). In the end, a "well designed website should provide brand experiences that attract, inform and compel transactions" such as "inquiries, subscriptions and orders" (Van Auken, 2003, p. 141).

Family Vault's website follows the directions as listed above. It is easily navigable, with a clearly labeled site map on each page. It has the logo in the top left corner on each page, and it features the product's information and benefits in a clear manner on the home page. The home page also attracts attention and allows consumers to identify with the brand through the incorporation of visual images of identifiable, relatable families that have realized peace of mind. The integrated tagline and headline are also featured on the home page, as well as the product attributes as listed on the packaging. Its colors and fonts are consistent with the logo, product and advertisements, and it discusses Dave Ramsey's endorsement, creating the total brand experience. The messages communicated through all advertisements and on the website appeal to the ease of the product and the overall peace of mind, or emotional benefit, it provides.

Dooley wrote:

The idea that ads that engage us emotionally work better than those that don't should not be a big shock to anyone who's spent time in advertising... Using a dual approach that includes some facts may be best for brands that aren't well known to consumers (2009, p. 241-242).

Family Vault's website engages emotions not only by using pictures, but by enlisting an "About Family Vault" page as well as a "Testimonial" page. These two pages help consumers know the history and story behind the brand and increase affinity for the brand while also helping viewers develop trust for the brand itself. As previously stated, consumers do not like choice, and they want to purchase a brand that has been vetted by numerous others. A testimonial page serves to ensure site visitors that Family Vault has been so vetted.

The website also encourages consumer transactions by providing a link for purchase and a list of Dave Ramsey events where the product will be featured. It furthers this encouragement by asking for site visitors to "get updates" and "get involved" by sharing their contact information. During the genesis of the campaign, updates might merely mean changes to the product format or to event dates, and being involved may mean only receiving emails when Dave Ramsey and Family Vault are nearby. However, it is important for a brand to develop a database of interested site visitors and purchasers as soon as possible in preparation for brand growth. Eventually, this database could be used to propel new products or to engage consumers with a monthly financial and organizational newsletter.

FamilyVault.com provides the total brand experience, propelling sales and transactions and building the brand online by appealing to both factual and emotional benefits. It provides links to both of the social media accounts, and it incorporates elements of all other brand identifiers. It serves as the culmination of all promotional efforts. *For an image and explanation of Family Vault's website home page design, see Figure 11 and the website creative rationale in APPENDIX.*

## **Chapter VII: Research Conclusion**

Family Vault is a “really new product” (Hoeffler & Herzenstein, 2012, p. 38) and a brand launch simultaneously. The budget consists of estimated numbers, as they do for all new products, and the chance of profit in the first year is slim, like other new products. However, the product design and marketing strategy have been fully researched and are prepared for success. The two sales goals, one more conservative than the other, are set at 1 percent of Dave Ramsey’s media reach, or 160,000 unit sales, and at 5 percent of Ramsey’s media reach, or 750,000 unit sales.

Appealing to the functional benefits of ease and organization while also appealing to the emotional benefits of peace of mind and protection for the family unit are unique selling points that have been proven to work by marketing professors and executives alike. The campaign’s goal is to encourage brand awareness and sales of its really new product while also appealing to these benefits. To do so it must become attractive to its niche market: middle-aged individuals with families interested in financial security and life organization. Both forms of the primary research, the surface-level Qualtrics survey and the more comprehensive conversations, determined this target market. It is imperative to seek out those naturally interested in such a product through appealing to a community leader.

Family Vault's campaign, "Peace of Mind" uses financial planning leader Dave Ramsey as an endorser and ensures the brand remains visible online, harnessing awareness through targeted Facebook advertisements and search engine optimization, mediums sure to reach the target audience. Its promotional efforts are geared toward following the AIDA model while creating a fully integrated campaign.



## **Chapter VIII: Campaign Rationale**

The campaign's creative is based heavily on the research and recommendations sought from professors in the Meek School of Journalism and New Media regarding how to raise brand awareness and what key terms and benefits raise emotional connections and sales numbers. The campaign title is "Peace of Mind" and seeks to highlight the importance of preparing today for unavoidable life events by organizing personal paperwork. This action protects loved ones from the aftermath of disaster and releases tensions and anxieties surrounding unorganized documents.

Family Vault will communicate this to the target market by presenting itself as a needed help first and foremost. No one (or very few people) enjoy the task of organizing life documents. However Family Vault helps consumers understand that it is necessary through the emotional story behind its founder, shared on the website and the packaging. The pictures on the website and the advertisements seek to be relatable to most in the target market, furthering the message that this product helps individuals and families like those in the target market, and the communication messages work to reinforce the theme of the campaign. Dave Ramsey, an organizational and financial community leader, will endorse the campaign, and Family Vault will seek to connect to his population of followers during its first year of production rather than spend a large amount of

money on advertisements that may or may not reach interested members of the target audience. Figure 12 explains the campaign tactics.

## PEACE OF MIND CAMPAIGN SPECS

**Title:** Peace of Mind

**Headline:** Family Vault: The Easiest Way to Organize Your Personal Documents in Preparation for Your Family's Tomorrow

**Tag:** Organize Today, Relax Tomorrow

**Primary Target:** Americans who have shown an interest in financial planning or who have recently endured a life-altering event and know the need for organized, protected paperwork, namely men and women age 31 to 50 who only feel "somewhat organized" currently

**Secondary Target:** Those who might purchase this organizer for another person, such as for their elderly parents or for their adult children

**Tone:** Kind and helpful, but serious

**Design Rationale:** Easily read, yet fun, font choices with high contrast colors that communicate a warning about unorganized documents and the importance of caring for your family

**Objective:** Through secondary research the planner has found that two large factors affect purchase of a really new product: (1) ease of use and (2) emotional benefits. The campaign focuses around messages that communicate both of these under the umbrella of the importance of obtaining peace of mind by protecting your family through organization. By appealing to the paternal and maternal faculties within influential men and women who know the need for organization and preparation, sales and awareness for Family Vault will soar.

**Figure 12: Campaign Specs**

## APPENDIX

## Survey Questions

This survey was created in Qualtrics and administered via email and social media between the months of October 2014 and January 2015. The site reported 319 surveys were started and 280 were completed. The survey was approved by the IRB.

1. What is your age?
  - Under 18
  - 18-22
  - 23-30
  - 31-50
  - 51-70 and older
2. What is your gender?
  - Male
  - Female
  - Prefer not to say
3. Which of these things do you have? Please check all that apply.
  - Life Insurance
  - Stocks
  - Last Will and Testament
  - House or Property
  - Safe Deposit Box
  - Funeral Arrangements
  - Retirement Savings Account
  - Vehicle
  - Bank Account (Savings/Checking/CDs/ETC)
  - Doctors/Prescriptions/Medical Records
  - Credit Cards
  - Passport/Driver's License/Birth Certificate
  - Vehicle Insurance
  - Home Insurance
  - Mortgage/Loans/Debt
4. How often would you say you think about documents pertaining to these things?
  - Never
  - Less than once a month
  - Once a month
  - 2-3 times a month
  - Once a week
  - 2-3 times a week
  - Daily

5. How organized do you feel concerning these documents?
  - Not at all
  - Somewhat
  - Extremely
6. If something were to happen to you, would your family members know where to access these documents?
  - Yes
  - Maybe
  - No
7. Would you be interested in a product to help organize your financial and life documents?
  - Yes
  - No
8. What format would best keep you organized? Please choose your top three choices.
  - Journal/Booklet
  - Online/Personal URL
  - Scanned-In Documents
  - CD/Flashdrive
  - Binder/Expandable File
  - Hired Help
  - Phone Application
9. Have you heard of this product before?
  - Yes
  - No
10. If so, where have you heard of it or seen it?
  - Open-ended response
11. Would you purchase this product?
  - Yes
  - No
12. If yes, how much would you pay for this product?
  - Less than \$10
  - \$10-\$15
  - \$16-\$25
  - More than \$30

13. Would you purchase this product for yourself or someone else?
- Myself
  - Someone Else
  - Both Myself and Someone Else
  - Neither
14. Where would you search for a product such as this? Please check all that apply.
- Online Stores
  - Bookstores
  - Bank/Financial Institution
  - Office and Organizational Stores
  - Other
15. If you chose "Other," please clarify.
- Open-ended response
16. Who do you think this product appeals to? Please check all that apply.
- New Parents
  - Single Individuals
  - Middle-Aged Adults with Families
  - Elderly/Aging
  - Those with Elderly Parents
  - Other
17. If you chose "Other," please clarify.
- Open-ended response
18. Regardless of your personal interest, would you recommend this product to a friend or family member?
- Yes
  - No
19. If so, who? Please check all that apply.
- New Parents
  - Single Individuals
  - Middle-Aged Adults with Families
  - Elderly/Aging
  - Those with Elderly Parents
  - Other
20. If you chose "Other," please clarify.
- Open-ended response

21. What is your approximate household net worth? Net worth refers to the value of everything you own minus the debt that you have.

- Less than \$50,000
- \$50,000 - \$100,000
- \$101,000 - \$250,000
- \$251,000 - \$500,000
- Greater than \$500,000



**Table 1:  
Previous Product Knowledge**

Have heard of it	32 people	11%
Have not heard of it	257 people	89%

**Table 2:  
Desired Format**

Binder/Expandable File	162 people	56%
Online/Personal URL	140 people	49%
Journal/Booklet	113 people	39%
Scanned-In Documents	94 people	33%
Hired Help	79 people	28%
CD/Flashdrive	58 people	20%
Phone Application	39 people	14%

**Table 3:  
Personal Perception of Organization**

Extremely Organized	55 people	19%
Somewhat Organized	195 people	66%
Not at All Organized	47 people	16%

**Table 4:**  
**Age 18-22 Product Interest**

Interested	82 people	76%
Not Interested	26 people	24%

**Table 5:**  
**Age 23-30 Product Interest**

Interested	15 people	83%
Not Interested	3 people	17%

**Table 6:**  
**Age 31-50 Product Interest**

Interested	65 people	77%
Not Interested	19 people	23%

**Table 7:**  
**Age 51-70+ Product Interest**

Interested	57 people	70%
Not Interested	25 people	30%

**Table 8:  
Would You Purchase It?**

Yes	192 people	68%
No	92 people	32%

**Table 9:  
Who Does it Appeal To?**

Middle-Aged Adults with Families	247 people	89%
Those with Elderly Parents	169 people	61%
Elderly/Aging	165 people	60%
New Parents	165 people	60%
Single Individuals	132 people	48%
Other*	5 people	2%

\*Those that answered “Other,” suggested that parents of special needs children would benefit from this product, as would those with chronically ill family members or those who have recently gone through a divorce.

**Table 10:  
Would You Recommend It?**

Yes	248 people	90%
No	29 people	10%

**Table 11:**  
**Document Thought Frequency for Somewhat Organized**

Never	13 people	7%
Less Than Once a Month	39 people	20%
Once a Month	34 people	17%
2-3 Times a Month	50 people	26%
Once a Week	20 people	10%
2-3 Times a Week	25 people	13%
Daily	13 people	7%

**Table 12:**  
**Document Thought Frequency for Extremely Organized**

Never	1 person	2%
Less Than Once a Month	12 people	22%
Once a Month	15 people	27%
2-3 Times a Month	15 people	27%
Once a Week	6 people	11%
2-3 Times a Week	2 people	4%
Daily	4 people	7%

**Table 13:**  
**Document Thought Frequency for Not At All Organized**

Never	13 people	28%
Less Than Once a Month	18 people	38%
Once a Month	8 people	17%
2-3 Times a Month	4 people	9%
Once a Week	1 person	2%
2-3 Times a Week	3 people	6%
Daily	0 people	0%

**Table 14:**  
**Age 18-22 Document Thought Frequency**

Never	23 people	21%
Less than Once a Month	32 people	29%
Once a Month	18 people	16%
2-3 Times a Month	21 people	19%
Once a Week	6 people	5%
2-3 Times a Week	8 people	7%
Daily	3 people	3%

**Table 15:**  
**Age 23-30 Document Thought Frequency**

Never	1 person	6%
Less than Once a Month	3 people	17%
Once a Month	5 people	28%
2-3 Times a Month	2 people	11%
Once a Week	3 people	17%
2-3 Times a Week	2 people	11%
Daily	2 people	11%

**Table 16:**  
**Age 31-50 Document Thought Frequency**

Never	0 people	0%
Less than Once a Month	17 people	20%
Once a Month	15 people	18%
2-3 Times a Month	24 people	29%
Once a Week	8 people	10%
2-3 Times a Week	24 people	29%
Daily	8 people	10%

**Table 17:**  
**Age 51-70+ Document Thought Frequency**

Never	4 people	5%
Less than Once a Month	17 people	21%
Once a Month	19 people	23%
2-3 Times a Month	22 people	27%
Once a Week	10 people	12%
2-3 Times a Week	8 people	10%
Daily	2 people	2%

**Table 18:**  
**Thought Frequency Differences Across Genders**

Female			Male	
Never	25 people	10%	2 people	4%
Less Than Once a Month	57 people	23%	12 people	25%
Once a Month	47 people	19%	10 people	21%
2-3 Times a Month	58 people	23%	11 people	23%
Once a Week	24 people	10%	3 people	6%
2-3 Times a Week	23 people	9%	11 people	23%
Daily	14 people	6%	3 people	6%

**Table 19:  
Desired Price Point**

Less than \$10	26 people	11%
\$10 - \$15	45 people	19%
\$16 - \$25	86 people	36%
More than \$30	84 people	35%



**Figure 3: Family Vault Logo**

Source: Claire Ellison Designs



## **Family Vault Logo Creative Rationale**

### **Design Strategy**

This is a family-oriented design with bright colors. The red and green used are a reflection from the research and discussions with experts. They emphasize the emotional warning and the overall importance of financial and life documents. This is a simple, clean-cut logo, yet it is one clearly belonging only to Family Vault. It is in the shape of a circle, enveloped in the red border, symbolizing the vault that protects the family and documents within it. The inclusion of the overarching word “family,” along with the heart and the drawing of the family, appeals to the emotional benefits of the brand and product.

### **Style Sheet**

Logo Title, First Line: Neou Thin; 21 pt.

Logo Title, Second Line: Neou Thin; 14 pt.

Background Color: R=140, G=198, B=63; Opacity dropped to 50%

Border and Heart Color: R=237, G=28, B=36

Font and Drawing Color: R=51, G=51, B=51

### **Choice of Typefaces**

Neou Thin was used to present a helpful, caring and fun brand logo. It is a bold, easily read typeface by people of all ages. It is still fun though, appealing to spendthrifts. The various sizes are used to create a hierarchy within the design, emphasizing “family” because of its emotional appeal to the target audience.



**Figure 4: Front Packaging Label**



## About Family Vault

Mary Daniel Simpson, a college student, founded Family Vault after her family realized the importance of organization during her parents' divorce.

The process was more painful than necessary because of the lack of communication prior to the divorce. No one other than her father knew where any personal documents were located, and they were not well organized.

Family Vault prepares men, women and their families for tragedies and life events when there is no time or energy to track down paperwork in multiple locations. It offers the opportunity to "Organize Today, and Relax Tomorrow," knowing that your family's personal documents can be easily located, transported and kept safe.

Save your family anxiety and let Family Vault help you efficiently decipher what documents are vital, need to be located and stored and how to best organize them in a self-contained, portable organizer.

Figure 5: Family Vault Back Packaging Label

## **Family Vault Packaging Rationale**

### **Design Strategy**

This design is meant to emphasize Family Vault's emotional and functional benefits. It appeals to people with all types of families and uses a diverse family in its imaging to ensure this. The red, green, logo and picture used are all carried over from other elements of the campaign and brand identifying images. The circles are used to carry out the design of the logo while also pointing to the product's fun and ease.

### **Style Sheet**

Product Attributes Header: Georgia; 32 pt. bold

Product Attributes Bullets: Georgia; 12 pt. bold

New Sticker: Georgia; 30 pt. bold

About Family Vault Header: Georgia; 32 pt. bold

About Family Vault Story: Georgia; 12 pt. bold

Font Colors: Red- R=237, G=28, B=36 and Black- R=51, G=51, B=51

Circle Colors: Green- R=140, G=198, B=63 and Red- R=237, G=28, B=36

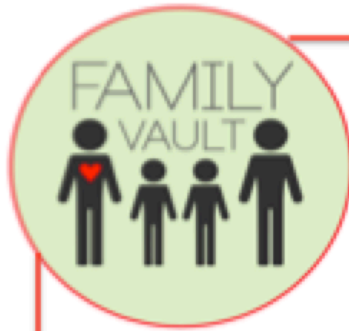
### **Choice of Typefaces**

Georgia was used throughout the packaging because it was recommended by Sanefski (personal communication, December 5, 2014) as a readable font popular for packaging. It communicates both the importance of the brand and the ease because it is a more casual, serif font.

## **Visuals**

All visuals are 72 ppi in RGB color and were found on the web.

- 1) Family of Four: <http://wallpaperdetails.com/happy-family-images>
- 2) Mary Daniel Simpson: Personal photograph



# Organize Today, Relax Tomorrow.

Include the following documents to prepare for your family's tomorrow.

1. **Identification**
  - Birth Certificates, adoption papers, certificate of citizenship, citizenship papers, driver's license copy, passports, social security cards, voters registration, selective services card and employee/government ID copy
2. **Bank Accounts**
  - List of all bank accounts, locations and user names and passwords pertaining thereto
3. **Retirement**
  - Individual retirement account information, 401(k) accounts, pension documents and annuity contracts
4. **Investment Portfolio**
  - Stock certificates, savings bonds and brokerage accounts and list of real-estate investments
5. **Loans and Mortgage**
  - Escrow mortgage accounts, proof of loans made and debts owed
6. **Personal Insurance**
  - Health and life insurance policies
7. **Property**
  - Tax returns, vehicle titles, housing, land and cemetery deeds, partnership and corporate operating agreements, surveys and appraisals and proof of insurance
8. **Safe Deposit Boxes and Safe**
  - Location, keys or combinations and itemized inventory for each
9. **Credit Cards**
  - Account information for each
10. **Medical Information**
  - Personal and family medical history, shot records, durable health-care power of attorney, authorization to release health-care information, do-not-resuscitate order and organ donor information
11. **Funeral Arrangements**
12. **Last Will and Testament**
  - Will, letter of instruction and trust documents
13. **Passwords**
  - To alarm systems, computers, email addresses, online accounts, financial information and etcetera
14. **Miscellaneous**
  - Government ID, marriage license, divorce papers, death certificate(s), deceased family records, family history, diplomas, pay stub for last year, W2s for every year, professional accreditations, religious records and etcetera

**Figure 6: Product Instruction Sheet**

## **Family Vault Interior Components Rationale**

### **Design Strategy**

This is an instructional document meant to inform and carry the brand's helpful and caring image. The images, colors, fonts and wording used are a reflection of the brand and are seen throughout the product and campaign elements. The interior components of the product are simple, clean-cut and easy to read and follow.

### **Style Sheet**

Instruction Sheet Tagline Header: Georgia; 36 pt.

Instruction Sheet Subhead: Georgia; 16 pt.

Instruction Sheet Numerical List:

Instruction Sheet Bullet Points:

Font Colors: Red- R=237, G=28, B=36; Green- R=140, G=198 and Black- R=51,  
G=51, B=51

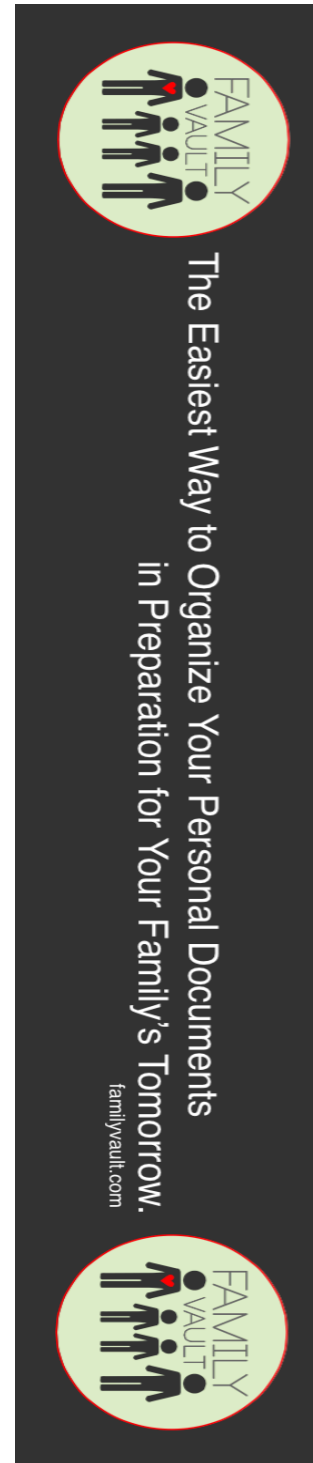
Line Color: Red-R=237, G=28, B=36

### **Choice of Typefaces**

Georgia was selected as the typeface to present a unified and businesslike (yet still fun) document organizer. It is a serif font and easy to read. Sanefski recommended this font for Family Vault (personal communication, December 5, 2014). The various sizes are used to create a hierarchy within the design.



**Figure 7: Banner One Design**



**Figure 8: Banner Two Design**

Source: Claire Ellison Designs



## **Family Vault Banner Design Rationale**

### **Design Strategy**

The banners are meant to be simple, easy to read and representative of Family Vault. They carry over the fonts and colors used throughout the campaign to present an integrated campaign. The logos are ever-present weights on each end, ensuring they are not missed. The tagline and messages are centered and easily read in the high contrast black and white combination.

### **Style Sheet**

Tagline: Helvetica, 72 pt.

URL: Helvetica, 24 pt.

Secondary Message: Helvetica, 48 pt.

URL: Helvetica, 24 pt.

Font Color: White

Background Color: Black- R=51, G=51, B=51

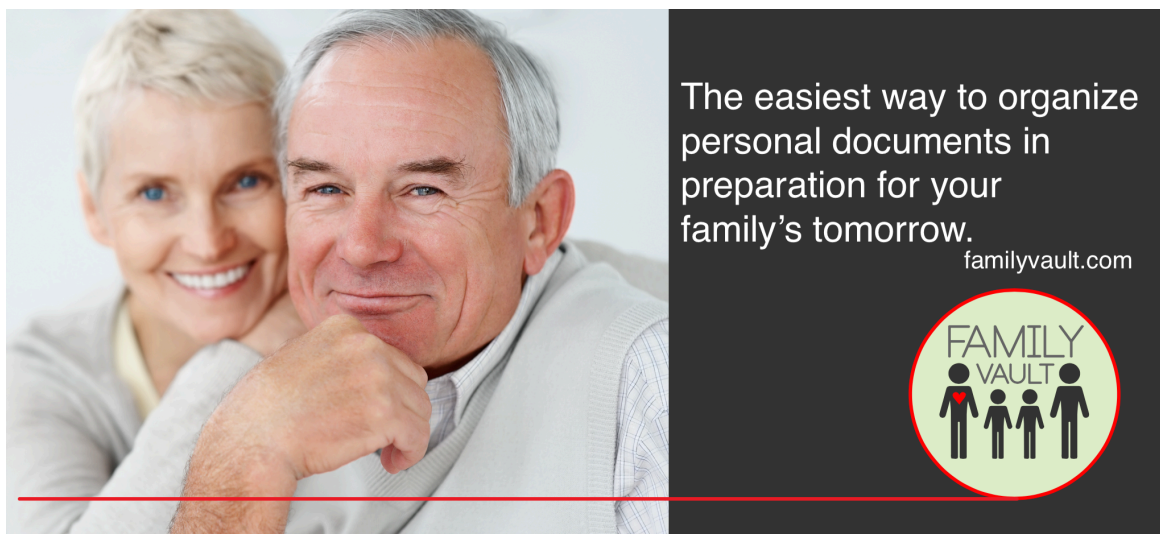
### **Choice of Typefaces**

Helvetica is bold, sans serif and easily read from a distance. It is used for important signs nationwide, including street signs, so it works well for a banner.



**Figure 9: Facebook Advertisement One Design**

Source: Claire Ellison Designs



**Figure 10: Facebook Advertisement Two Design**

Source: Claire Ellison Designs

## **Family Vault Facebook Advertisement Design Rationale**

### **Design Strategy**

This is a family-oriented design showing that Family Vault is relatable to all families, especially those with reason to organize themselves, such as age or children. The red, green and white used are a continuation of the brand logo and other campaign designs. The line drawn from the logo around the image pulls viewers eyes toward the message and the logo, as does the glance, or focus of the images.

### **Style Sheet**

Tagline: Helvetica, 36 pt.

Secondary Message: Helvetica, 21 pt.

URL: Helvetica, 18 pt.

Font Color: White

Background Color: Black- R=51, G=51, B=51

Line Color: Red-R=237, G=28, B=36


### **Choice of Typefaces**

Helvetica was used to mimic the banner and website and to present a unified, integrated brand. It is an easily read typeface by people of all ages.


## **Visuals**

All visuals are 72 ppi in RGB color and were found on the web.




- 2) Family of Four: <http://wallpaperdetails.com/happy-family-images>
- 3) Elderly Couple: [http://orthobalancept.com/?attachment\\_id=1963](http://orthobalancept.com/?attachment_id=1963)



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Search 

# Organize today, relax tomorrow.

**FAMILY VAULT: The Easiest Way to Organize Your Personal Documents in Preparation for Your Family's Tomorrow**

- Self-containing and portable
- Pre-labeled for all family documents, from automobile titles to living will and testaments
- All parts included
- Scaled to fit in an average lockbox
- Easy to follow organization instructions inside
- Minimal time investment for lifelong peace of mind



Family Vault is endorsed by American financial author, radio host, television personality and motivational speaker, Dave Ramsey. Family Vault organizers will be sold at Dave Ramsey's events, as he travels across the country teaching people how to better manage their money and life.

[CLICK HERE](#) for dates and locations of events.

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phone...

submit

### GET INVOLVED


name...


email...

zip code...

submit

### FOLLOW US

 Family Vault

 @familyvault

**Figure 11: Website Home Page Design**

Source: Claire Ellison Designs

## **Family Vault Website Design Rationale**

### **Design Strategy**

It is a straightforward design featuring simplified messages and a few bright colors. The dark gray, black, white, green and red used are a reflection from the logo and advertisement design, so as to further the brand. Other than the logo in the top left corner, the only font used was Helvetica. This produces a simple, clean-cut website. Circles were used throughout the design, mimicking the logo.

### **Style Sheet**

Header—Search: Helvetica, 14 pt.

Navigation Primary: Helvetica, 14 pt.

Main Headline—Tagline: Helvetica, 36 pt.

Secondary Message Title: Neou Thin, 21 pt.

Title of Product Attributes: Helvetica, 21 pt.

Body of Attributes: Helvetica, 21 pt.

Dave Ramsey Information: Helvetica, 18 pt.

Dave Ramsey Hyperlink Navigation: Helvetica, 18 pt.

Footer—Primary Directory Titles: Helvetica, 21 pt.

Footer—Social Media Links: Helvetica, 14 pt.

Footer—Contact Information Fill-In: Helvetica, 21 pt.

Footer—Submit: Helvetica, 14 pt.

Header and First Section Font Color: White

Header and First Section Background Color: Black-R=51, G=51, B=51

Header Line Color: R=140, G=198, B=63; Opacity dropped to 50%

Circle Color: Red-R=237, G=28, B=36

Second Section Font Color: Black- R=51, G=51, B=51 and Red-R=237, G=28, B=36

Second Section Image Background Color: Black- R=51, G=51, B=51 and Red-R=237, G=28, B=36; Opacity dropped to 20%

Third Section Background Color: White

Third Section Font Color: Black- R=51, G=51, B=51 and Red-R=237, G=28, B=36

Footer Background Color: R=140, G=198, B=63; Opacity increased to 50%

Footer Font Colors: White and Black- R=51, G=51, B=51

Footer Submit Button Color: Red-R=237, G=28, B=36

### **Choice of Typefaces**

Helvetica presents a unified, branded and simplified website design. The various sizes are used to create a hierarchy within the design. It is an easily read typeface by people of all ages, and it reflects the ease of the product.

### **Visuals**

All visuals are 72 ppi in RGB color and were found on the web.

- 1) Family of Three: <http://quotespics.quotes8.com/quotes/black-family.html>
- 4) Elderly Couple: [http://orthobalancept.com/?attachment\\_id=1963](http://orthobalancept.com/?attachment_id=1963)
- 2) Family with Dog: <http://galleryhip.com/happy-family-with-dog.html>
- 3) Dave Ramsey: [http://www.forbes.com/fdc/welcome\\_mjx.shtml](http://www.forbes.com/fdc/welcome_mjx.shtml)

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